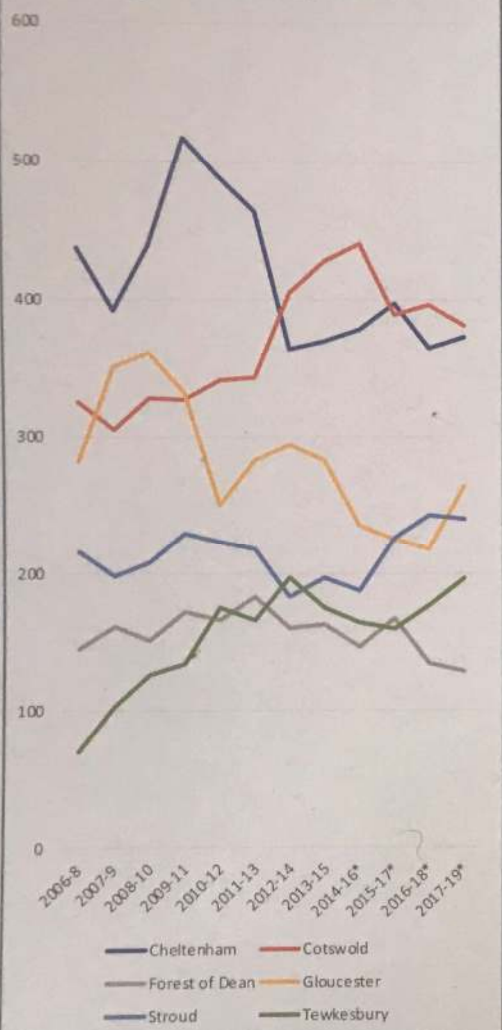
4.1 The Volume & Value of Tourism to Gloucestershire 2019

All Domestic Overnight Trips – Long-term Trend by District

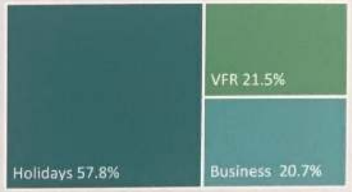


Gloucestershire

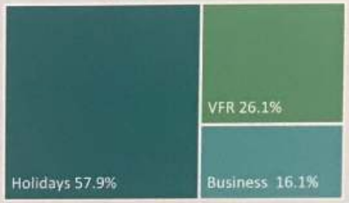
Summary of Market Size

Visit Type	Volume (million)	Share	Value (£million)	Share
Domestic Day Visits	21.1	91.7%	£546	56.5%
Domestic Overnight Visits	1.59	6.9%	£257	26.6%
Inbound Visits	0.31	1.3%	£163	16.9%
Total	23		£966	

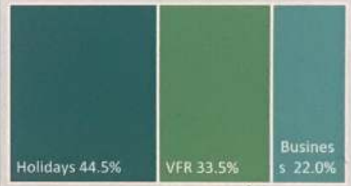
Domestic Tourism - England
% Split by trip purpose



Domestic Tourism - Gloucestershire
% Split by trip Purpose



Inbound Tourism - England
% Split by trip purpose



Inbound Tourism - Gloucestershire
% Split by trip purpose

1. Tourism in Gloucestershire is a £1 billion a year industry and in 2019 was estimated to have attracted a total of 23 million visits, the majority in volume terms being day visitors.
2. This split is not unusual and the County sees a higher proportion of domestic staying visits relative to total domestic demand which is likely to be accounted for by a strong demand for short-breaks in the Cotswolds from the UK market.
3. The County's 1.59m domestic visits are skewed towards shorter breaks. The proportion of this type of visit is higher than many other destinations. The West Midlands for example sees a domestic overnight visits proportion of 5.6% compared with 6.9% in Gloucestershire with spending at 18% in the West Midlands and 26.6% in Gloucestershire. This reflects a very strong leisure and VFR offer in the County but with less business-related tourism.
4. Gloucestershire matches England in terms of the proportion of visits by purpose when considering UK Holidays. It under-indexes substantially on business tourism and over-indexes on Visiting Friends & Relatives. This will reduce accommodation requirements but supports a vibrant visitor attraction sector.
5. The long term trend in the numbers of overnight trips by UK residents by District shows growth for Cotswold, Stroud and Tewksbury, a neutral trend for the Forest of Dean but a reduction for Cheltenham and Gloucester. The trends are likely to be accurate and do not necessarily reflect any weaknesses in the cities themselves, rather point to wider trends in the market place. The individual numbers are in a range and should be treated with caution – see Notes.
6. For the inbound market VFR is very buoyant, over-indexing the national average by a significant 13%. This again may reduce accommodation demand relative to other destinations but it will be more marginal in terms of impact due to the relatively small share of inbound tourism relative to domestic.

Notes:

1. Sources: VisitBritain (2019) Great Britain Tourism Survey & Great Britain Leisure Day Visits Survey & ONS (2019) – International Passenger Survey
2. The data are a three year average of trips taken wit the latest being 2017 – 19. Such an average helps with robustness given small sample sizes. For example the middle Table shows that Gloucestershire has an average annual volume of 1,593,000 domestic trips. There is a 95% confidence that the true average trip volume is in a range between 1.43 million visitors and 1.75 million (Margin of error +/-10%).
3. In the chart to the left, the margin of error at the level of the Districts is at 95% confidence. So for example visitor numbers to the Cotswolds in 2017-19, were between 297,000 and 465,000 (Margin of error +/-22%). The lines for the Districts can be considered as being wider than drawn, encompassing a range either side of the mid-point.